

**BART Agreement Number: 6M6146**

**Approval Date: 4/20/2022**

**Work Plan No.: A.02-01 Engagement and Outreach Services - Link21**

**Scope:**

**WORK PLAN REQUEST**

*Link21*

Agreement No. 6M6146-SC1

Work Plan No. 2

Engagement and Outreach Consultant: HDR

Planned Period of Performance: March 2022 – October 2023

Services procured in accordance with services Agreement No. 6M6146-SC1, Attachment A, Scope of Services.

**1.0 INTRODUCTION**

Link21 (formerly known as the New Transbay Rail Crossing) is a transportation program sponsored by the San Francisco Bay Area Rapid Transit District (BART) and the Capitol Corridor Joint Powers Authority (CCJPA) to transform the passenger rail network serving the 21-county Northern California Megaregion (Megaregion), which includes the greater San Francisco Bay Area, the Monterey Bay area, the Sacramento area, and the Northern San Joaquin Valley. Link21 is a program of projects that will build on the existing BART and Regional Rail systems and include a new transbay passenger rail crossing project (Crossing Project) between Oakland and San Francisco that will serve the busiest and most congested corridor in the Bay Area. The Crossing Project will increase capacity and bring new passenger rail connections and services to the Megaregion. A joint BART/CCJPA team has been established, underscoring the partnership of the two agencies and their shared commitment to Link21.

**Task 1 Management**

Management and coordination within the context of the larger program, including developing, managing, and reporting on scope, schedule, and budget, and coordinating with the Program Management Team (PMT) and other Consultants. This task also includes internal communication and project management within the Consultant team to monitor progress and ensure adherence to scope, schedule, and budget.

**Task 1.1 Coordination Meetings**

The Consultant will prepare for and attend coordination meetings as summarized below (these meeting estimates may vary):

Meeting	Frequency
<u>Link21 Leadership Meetings</u> – The PMT leadership team and each of the service category Consultant project managers meet to discuss overall strategy in delivering the program.	Bi-monthly
<u>Engagement and Outreach Team Meeting</u> – Regular meeting to review/collaborate on the development of deliverables prepared by the Consultant. Includes management of inputs/outputs/dependencies with other technical teams and work planning, including schedule and scope.	Weekly
<u>Technical Integration Meeting</u> – Regular meeting to discuss issues and collaborate regarding task dependencies among the four service categories.	Bi-weekly

Meeting	Frequency
<u>Equity Coordination Meetings</u> – Regular meeting with PMT equity staff to discuss the incorporation of the <i>Equity Blueprint</i> in Consultant work.	Weekly
<u>Equity Implementation Plan Meetings</u> – Quarterly meetings with key Consultant and PMT staff to monitor and discuss the incorporation of the Equity Implementation Plan developed in WP1.	Quarterly – 2 hours
<u>Engagement and Outreach Equity Leadership Meetings</u> – Regular meetings with the Equity Leadership Team to discuss and Equity work with Engagement and Outreach.	Weekly – hour
<u>Collaboration Council Meetings</u> – Coordination of principals to discuss project quality, schedule, and general progress.	Quarterly
<u>Engagement Manager's Meeting</u> – Regular meeting to review/collaborate on strategy development and management of inputs/outputs/dependencies with other technical teams.	Weekly – 2 hours (Project Manager, Deputy Project, Equity Manager, Stakeholder Outreach Manager, Public Affairs Manager)
<u>Task 2 Coordination Meeting</u> – Meeting with Task 2 representatives (Strategic Advisory) to discuss public affairs strategies and initiatives.	Bi-monthly – 1.5 hours (Public Affairs Manager, Project Manager, Deputy Project Manager, Equity Manager, Stakeholder Manager)
<u>Technical Task Coordination Meetings</u> Monthly meeting with the Task 2, 5, 8, and 9 teams. This meeting will allow the Engagement and Outreach team to be in alignment with the other tasks in the preparation and execution of future engagement and outreach activities.	Monthly – 1.5 hours (Project Manager, Deputy Project, Equity Manager, Stakeholder Outreach Manager, Public Affairs Manager, and appropriate support staff)

In addition to the above listed meetings, additional meetings may be scheduled as required for continued collaboration and coordination. Consultant to host and/or attend up to eight additional meetings each month.

## **Task 1.2 Reporting**

### **1.2.1. Cost Estimate and Schedule Management**

Prepare and provide the following cost estimate and schedule deliverables in accordance with the means, methods, and format identified in the Link21 *Cost Estimating and Schedule Management Plan*.

#### *Deliverables*

1. *Cost Estimate for the Work Plan*
  - a. *Summary Cash Flow – due one month after notice to proceed (NTP) then monthly by the 10th of each month via Excel template provided*
  - b. *Basis of Estimate – due one month after NTP then two weeks after any approved baseline change*
  - c. *Description of Estimating Software (used to prepare the estimate) – due one month after NTP then two weeks after any approved baseline change*
2. *Cost-loaded (at deliverable/subtask level) P6 Schedule (by the 10<sup>th</sup> of each month)*
  - a. *Schedule Control Plan – monthly with XER*
  - b. *XER Native File Format – monthly*
  - c. *P6 Software Configuration Settings – monthly with XER*
  - d. *High-level Schedule (pdf) – monthly with XER*
  - e. *Full Schedule in Gantt Format (pdf) – monthly with XER*
  - f. *Two Week Lookahead in Gantt Format (pdf) – monthly with XER*
  - g. *Critical Path in Gantt Format (pdf) – monthly with XER*
  - h. *Schedule Log – monthly with XER*
  - i. *Fragnets in XER and pdf – as requested*
  - j. *Ad Hoc Reports – as requested*

### **1.2.2. Cost Management**

Prepare and provide the following cost management deliverables in accordance with the means, methods, and format identified in the Link21 *Cost Management Plan*.

#### *Deliverable*

1. *Trend and Variance Reporting – monthly reporting by the 15<sup>th</sup> of every month*

### **1.2.3. Risk Management**

Prepare and provide the following risk management deliverables in accordance with the means, methods, and format identified in the Link21 *Risk Management Plan (RMP)*.

#### *Deliverables*

1. *Risk Register: Quarterly updates*
2. *Risk Status Reports: Quarterly updates*

#### **1.2.4. Invoicing and Progress Reports**

Consultant will prepare monthly invoices and associated progress reports by the 10<sup>th</sup> of each month, per the BART format, that reflect the actual labor and expenses incurred as well as the project progress for that reporting period.

#### **Task 1.3 Future Work Plan Development**

Utilizing the BART/CCJPA template, the Consultant will prepare a work plan proposal for additional services, as directed. This will require close coordination with the PMT and the other delivery Consultants.

##### *Deliverable*

1. *Work Plan as requested at a date to be determined*

#### **Task 2 Engagement and Outreach Activities**

The Consultant will provide engagement strategy and support services upon authorization by the BART program director, BART engagement and outreach manager, PMC program manager, and PMC engagement and outreach delivery manager. The Consultant will execute engagement activities that allow BART/CCJPA to solicit input from organizations, elected officials, public agencies, general public, priority populations, tribal communities, and businesses as Link21 advances toward program alternatives. The Consultant will also serve as a community liaison and spokesperson for Link21.

##### **Task 2.1 Engagement Action Plans**

The Consultant will implement the Phase 1 Engagement Action Plan (EAP) to provide engagement and outreach support for the Link21 Program. The EAP may be adjusted throughout Phase 1 to accommodate and meet the goals and objectives of the program as planning moves forward. The EAP includes communication and outreach goals; objectives and desired outcomes; identifying target audiences, tools, and tactics; monitoring strategies, and schedule of activities. Targeted strategies will be identified for reaching specific and diverse audiences including but not limited to priority populations, people with disabilities, LGBTQI+ community, individuals with limited English proficiency, faith-based, youth, business, tribal communities, communities of color, low-income, and others including historically disenfranchised populations across the Megaregion.

##### *Deliverables*

1. *Updated Engagement Action Plan – due every 12 months or as needed*
2. *Updated schedule of activities – due quarterly*

##### **Task 2.2 Stakeholder Coordination**

The Consultant will support PMT leadership, specifically the Strategic Advisory task and the executive leadership team, to identify, schedule, and prepare for meetings with key stakeholders, including partner agencies, municipalities, counties, and other jurisdictional, advocacy, and community organizations. For key stakeholder meetings, the Consultant will research the stakeholder's position, priorities, and issues, and prepare a briefing and/or talking points for presentation and/or briefing spokespersons and PMT representatives, as needed.

The Consultant will also assist the PMT and the PMT executive leadership team with planning, scheduling, and supporting meetings with Link21 working groups, the Program Development Team (PDT), Jurisdictional Working Group (JWG), and the Equity Advisory Council to keep these groups abreast of program progress and seek input at critical technical milestones. During Phase 1, these groups may be convened more frequently based on technical work that will identify and evaluate concepts for consideration.

The Consultant will also assist with coordinating regularly with key stakeholders to maintain connection and a conduit for information sharing, building relationships, and partnering to distribute Link21 information through their established communications channels, such as social media platforms, websites, e-newsletters, and other tools.

The Consultant will also assist the PMT with scheduling, preparing for and managing the agency public information officer (PIO) and BART/CCJPA communications and government relations working groups. The Consultant will prepare for in-person and virtual meetings by scheduling, organizing logistics, preparing invitational materials, producing meeting materials (agenda, handouts, presentation slides, posterboards, and other materials as appropriate), attending and helping facilitate meetings, and preparing meeting minutes, which include stakeholder comments, action items, and decisions made. Record and track participation and comments in the Public Involvement Management Application (PIMA) database and the discussion tracker.

Meeting	Quantity	Agenda	Minutes	Power-Point	Supporting Documents	Talking Points/Briefing Document	Scheduling and Logistics	Invitational Documents
PDT Executive	Up to 5	X	X	X	X	X	X	X
PDT Staff	Up to 19	X	X	X	X	X	X	X
JWG	Up to 10	X	X	X	X	X	X	X
BART Board (monthly)	Up to 19			X	X	X		
CCJPA Board (bi-monthly)	Up to 8			X	X	X		
Individual/Small Group Meetings Speakers Bureau	Up to 200	X	X	X	X	X	X	X
Agency PIO Meetings	Up to 19	X	X	X	X	X	X	X
Communications and Government Relations	Up to 19	X	X	X	X	X	X	X
Equity Accountability Council	Up to 10	X	X	X	X	X	X	X

### **Task 2.3 Public Affairs**

Support the implementation of the public affairs strategy that includes monitoring Megaregion elected officials and their individual platforms and issues, identifying industry speaking or presentation opportunities, and facilitating a speakers bureau that targets meetings/briefings with local, regional, state, industry, advocacy, and business organizations.

The Consultant will support the execution of proactive strategies to create support and enthusiasm for Link21 among businesses, labor, tribal communities, advocacy groups, and other stakeholders. In support of the public affairs strategy, targeted materials, presentations, and messaging will be developed to aid the program spokespersons in connecting with, educating, and building understanding with each engagement opportunity.

The Consultant will assist in developing and implementing, in coordination with the PMT, a diverse speakers bureau that reaches target groups and audiences in a strategic and timely fashion to keep them informed and provide opportunities for input. The Consultant will seek out speaking opportunities with local business, advocacy, and industry groups and organizations to create awareness of the Link21 Program.

In addition, the Consultant will identify Link21 spokespersons, maintain a library of speakers' biographies and headshots, and conduct spokesperson training when necessary.

#### *Deliverables*

- 1. Maintain elected and public officials database (ongoing), provide updates around election cycles*
- 2. Assist with developing agendas, drafting meeting notes, and preparing PowerPoint presentations and other supporting materials for meetings with elected officials and public agencies (ongoing)*
- 3. Develop materials to support industry speaking engagements and briefings/meetings through the speakers bureau, including, but not limited to, presentations, meeting notes, action items, scripts, fact sheets, and infographics*
- 3. Develop guidelines and protocol document for the speakers bureau*
- 4. Maintain a log of speaking engagements (ongoing), provide a weekly report that includes speaking engagement, topic, date, speaker, etc.*
- 5. Provide up to eight (8) spokesperson training sessions on as-needed basis*

### **Task 2.4 Media Relations**

In collaboration with BART/CCJPA communications staff and the PMT, the Consultant will support the implementation of the media relations strategy. The Consultant will maintain the media database and proactively identify paid and earned media opportunities. The Consultant will collaborate with BART/CCJPA communications staff and the PMT to coordinate local, state, and national media responses and opportunities, identify opportunities for editorial board briefings and op-eds, maintain an editorial calendar, and promote in ethnic, community, local, regional, and national outlets and publications. In addition, the Consultant will assist the PMT with monitoring media stories and providing insight that will help to guide coordination, identify strategies, and manage messaging. The Consultant will also evaluate current media monitoring tools and make recommendations for additional tools in order to make strategic decisions regarding the program's media relations efforts.

#### *Deliverables*

1. *Update and maintain media list (ongoing)*
2. *Develop talking points for specific events, communications plans, or media opportunities on an as-needed basis (ongoing)*
3. *Develop up to six (6) multilingual print and/or digital advertisements*
4. *Develop up to four (4) op-eds on as needed basis*
5. *Develop up to six (6) public service announcements*
6. *Update media relations strategy as needed*
7. *Develop story pitch ideas for inclusion into local, regional, and national media outlets*

#### **Task 2.5 Grassroots Community Engagement**

The Consultant team will develop and manage a grassroots outreach plan and effort that will include regular attendance at community events, neighborhood pop-up events, intercept surveying, and tabling at fairs, festivals and community gathering places such as transit stations, onboard trains, farmers markets, community centers, libraries, and other local gathering places. When engaging in person, outreach will be conducted in teams of two, at a minimum, to promote safety and compliance with local, state, and federal COVID guidelines.

Each round of outreach will have an individual grassroots outreach plan that follows BART/CCJPA and Link21 established policies, procedures, and protocols regarding noticing. The plan will be reviewed and approved by BART/CCJPA staff and the PMT.

#### *Deliverables*

1. *Grassroots outreach plan for each major round of outreach that includes logistics, schedule, and targeted events and audiences*
2. *Attend up to six (6) events a month in various locations of the four subregions*
3. *Update the events/festivals opportunities list quarterly or as needed; this list will include the name of the event, cost, location, target audience, and expected attendance*
4. *Up to three (3) targeted promotional and event documents (i.e., fact sheets, postcards, posters, mailers, etc.) per round of outreach*
5. *Summary report after each event that includes pictures and information regarding attendees, number of people reached/conversations held, etc.; this report will be provided within 72 hours of each event*
6. *Draft Summary Report of Community Outreach 30 days after each round of outreach*
7. *Final Summary Report of Community Outreach 45 days after each round of outreach*

#### **Task 2.6 Online and In-Person Public Outreach Activities**

The Consultant, in collaboration with the PMT, will develop and manage the implementation of a strategy for targeted, accessible, and multilingual public outreach activities, such as open houses, workshops, telephone town halls, charrettes, webinars, office hours, live Q & A events, and online chat sessions at key technical milestones to support Phase 1 planning. These outreach activities will provide timely opportunity to share information, educate, and seek informed input that will help guide key program decisions leading up to Stage Gate 2.

The Consultant will manage logistics for each event, including scheduling, staffing and facilitation, materials and tools, messaging, audio/visual support, security and promotion through direct mailers, electronic invitation distribution, material placement within community

gathering places, media outlets, Link21 website, social media platforms, and stakeholder coordination. Interactive tools will be utilized whenever possible to share information and garner input. These outreach activities will be implemented at up to four key technical milestones.

*Deliverables*

1. *Logistics plan for up to four large-scale outreach activities at 90 days prior to each event*
2. *Meeting materials (presentations, talking points, handouts, etc.) and messaging to support up to three large scale outreach activities at least 30 days prior to each event*
3. *Promotional materials for each round of outreach to include content for social media, email blasts, newsletters, blogs, and Link21 website 45 days prior to each event*
4. *Draft Summary Report of Outreach Activities due 30 days after each round*
5. *Final Summary Report of Outreach Efforts due 45 days after each round*

**Task 2.7 Equity Accountability Council Support**

The Consultant will support the establishment of an Equity Accountability Council. In addition to the meeting responsibilities listed in Task 2.2, the Consultant will conduct the application solicitation effort to ensure applications are received from a broad pool of qualified individuals. This will include the development of both outreach/solicitation materials, as well as the application itself. The Consultant will participate in any other as-required meetings that support the establishment of the EAC and any required iterations to the EAC as the group begins meeting.

*Deliverables*

1. *Draft EAC Recruitment Plan, 120 days prior to the first meeting*
2. *Final EAC Recruitment Plan, 90 days prior to the first meeting*

**Task 2.8 Targeted Communications Plans**

The Consultant will develop and implement a series of targeted communications plans that support the goals and objectives of the Link21 Program and increase the knowledge and engagement of stakeholders, priority populations, and the general public. Communications plans could be geographically specific, target audience specific, topic specific, or supportive of technical work. Communications plans will include goals and objectives, strategies, tools, tactics, schedule, and metrics. These plans will become addendums to the EAP.

*Deliverables*

1. *Up to six (6) targeted communications plans (i.e., geographic, topic, target audience, or technical work specific) 60 days prior to the start of each effort*

**Task 2.9 Coordination with Tribal Communities**

The Consultant will work with the PMT, Environmental, and Strategic Advisory teams to implement the tribal community communication and outreach plan developed in Work Plan 1. This plan identifies tribal communities, contacts, and protocols Link21 Team members should follow when engaging these communities.

The Consultant will work with appropriate BART/CCJPA staff, PMT members, and the Consultant Environmental teams to plan and schedule meetings and forums for engagement



activities to gather input and feedback. BART/CCJPA staff responsible for tribal community relations will be present at all meetings and activities.

All communication and meetings should be documented according to federal guidelines.

*Deliverables*

*1. Meeting notes, attendee sheets, agendas, and other documents needed to support meetings*

**Task 2.10 Ongoing Engagement and Outreach Support**

Provide graphics, content, and support for other Link21 tasks, including Strategic Advisory, Travel Demand and Land Use, Environmental, Planning and Engineering, and Business Case. Mapping and geospatial data produced by the Engagement and Outreach Team should be uploaded to the GeoPortal.

*Deliverables*

*1. Graphics and other support for Travel Demand and Land Use (ongoing)*

*2. Graphics and other support for Environmental (ongoing)*

*3. Graphics and other support for Planning and Engineering (ongoing)*

*4. Graphics and other support for the Business Case (ongoing)*

*5. Graphics and other support for Strategic Advisory (ongoing)*

*6. Graphics and other support for Equity (ongoing)*

**Task 3 Communications Tools**

The Consult will support the development and implementation of various communications tools and tactics to inform, engage, and solicit input and feedback from the various Link21 audiences.

**Task 3.1 Collateral Materials Development**

The Consultant, in collaboration with the PMT, will identify and manage the preparation of informational materials to support the engagement activities outlined above. These materials will follow Link21's branding, style, and editorial guidelines. All informational materials will be translated into Spanish and traditional Chinese, at a minimum, with up to four additional targeted languages in alignment with BART/CCJPA and Link21 policies, guidelines, and protocols to reach audiences across the Megaregion. Language translation will be coordinated through the BART translation services contract and will be compliant with the Americans with Disabilities Act (ADA) and compliance with Section 508 of the Rehabilitation Act will be at an agreed upon threshold for the Link21 Program. Informational materials include, but are not limited to:

- **Fact Sheets:** Prepare up to 12 new and/or update existing fact sheets showcasing various aspects of the program, including specialized/targeted fact sheets, as needed.
- **FAQs:** Update and maintain the list of frequently asked questions (FAQs) on the website.
- **Surveys:** Under the direction of the PMT, the Consultant will assist with developing and deploying paper and online convenience surveys to engage and garner the public's opinions about key program topics. The survey will be distributed through the Link21 website, e-newsletters, social media channels, community events, and other Link21, BART, and CCJPA outlets.

- **Master PowerPoint:** Maintain and update the master PowerPoint presentation, as needed. Develop specialized PowerPoints for various meetings and presentations, as needed. Manage PowerPoint presentation library.
- **Targeted Outreach Materials:** Develop targeted materials to support outreach to tribal, minority, low-income, non-English or limited English proficiency, and other priority populations, including synthesis and report-back materials from targeted community engagement activities. This could include a regularly occurring equity newsletter.
- **Program Newsletter:** Develop a quarterly newsletter geared for the general public that provides program updates and other information relevant to the public. This newsletter will be electronic and formatted for printing if needed.
- **Youth Activity Books:** As part of the youth engagement strategy, an activities book will be developed and distributed about Link21 to aid in engaging the youth in an interactive way.
- **Stage Gate 2 Materials and Phase 1 Summary Report:** Develop a report that summarizes Phase 1 engagement and outreach activities. The report will include outreach statistics, copies of collateral materials (fact sheets, advertisements, social media posts, etc.) developed for Phase 1 outreach, photos, sign-in sheets, and other information documenting efforts. The Consultant will also support the development of other needed materials to support the transition from Stage Gate 1 to Stage Gate 2.

#### *Deliverables*

1. Up to 12 fact sheets with up to three rounds of edits each (ongoing)
2. Maintain and update the current list of FAQs, as needed (ongoing)
3. Maintain and update the master PowerPoint presentation (ongoing)
4. Conduct up to four (4) messaging workshops, as needed
5. Draft youth activity book, due 60 days prior to publication
6. Draft final activity book, 30 days, prior to publication
7. Targeted outreach materials, with up to three rounds of edits per document (ongoing)
8. Draft of Phase 1/Stage Gate 2 Summary Report
9. Draft final of Phase 1/Stage Gate 2 Summary Report
10. Various supporting materials for Stage Gate 2/Phase 1 documentation

#### **Task 3.2 Website**

The Consultant will assist the PMT with the development and deployment of content and assets development for the website, including interactive components.

#### *Deliverable*

1. Up to 25 website content updates (text and graphics) (ongoing)

#### **Task 3.3 Social Media**

The Consultant will work in collaboration with BART/CCJPA communications staff and the PMT to update and implement the social media strategy, and support the development of content, graphics, and advertisements for social media.

#### *Deliverables*

1. Draft monthly social media content schedule
2. Draft social media content and graphics (as needed)

*3. Up to 18 social media posts/ads for the three large-scale outreach activities*

**Task 3.4 Public Contact Database**

The Consultant will support the maintenance and update of the public contact database housed in PIMA. The database currently includes contact information for local, state, and federal elected and public officials; agency executives and staff; municipalities; media outlets; community-based organizations; advocacy groups; business and civic groups; neighborhood associations; general public; and others interested in Link21. The Consultant will coordinate with the Travel Demand and Land Use, Environmental, Business Case, and Planning and Engineering teams to gather additional contacts for inclusion into the PIMA database.

*Deliverable*

- 1. Monthly database expansion and maintenance (up to 18 updates, as needed)*

**Task 3.5 Public Comments Database**

The Consultant will assist with maintaining a public comments database located in the PIMA system. The database will be structured for compliance with the National Environmental Policy Act (NEPA) and California Environmental Quality Act (CEQA) requirements. The database will include comments from the phone portal, online surveys, comment forms, and other channels.

The Consultant will also develop draft responses to comments received through PIMA, email, phone calls, and public meetings/workshops. The Consultant will work with task leads, as necessary, to develop these responses. Responses should be made in accordance with Link21 protocols.

*Deliverables*

- 1. Maintenance of comments database*
- 2. Monthly report of comments, emails, and phone calls that includes sentiment of comments (positive, negative, neutral)*

**Task 3.6 Digital Engagement Tools**

Under the direction of the PMT, the Consultant will identify, develop, and manage the distribution of digital/interactive tools designed to reach target audiences in an effective way. These tools may include video, animation, mobile apps and gamification, storymaps, blogs, dashboards, and interactive microsites. The Consultant will work with the PMT technology team to support these efforts.

*Deliverable*

- 1. Digital logistics plan and tool (as identified and needed)*
- 2. Ongoing Communication Tools Support*

The Consultant will support the development and implementation of various communications tools and tactics to inform, engage, and solicit input and feedback from the various Link21 audiences.

#### **Task 4 Payments to Community Co-Creation Partners (CBOs) and Participants and EAC Members and**

The Consultant will manage a system that distributes and tracks payments to the community co-creation workshop partners and participants and EAC members.

##### **Task 4.1 Co-Creation**

The Consultant will work with the Link21 Equity Team to develop, execute, and manage up to two rounds of community co-creation workshops to solicit input on technical topics that inform the concept development and advancement process. The Consultant will coordinate with community-based and non-government organizations, civic, faith-based, youth, and other advocacy groups; develop materials for community co-creation workshops; develop a report-back system; provide full data analysis and synthesis to the Link21 Team. If needed, the Consultant will create other avenues for community co-creation.

The Consultant will continue to partner with appropriate participants from initial rounds of community co-creation and create new partnerships with groups that can help the Link21 Team receive input from key priority populations, geographies, and identities. In addition to Rounds 4 and 5, and upon request from PMT, the Consultant will ; conduct limited versions of co-creation outside of Rounds 4 and 5 on topics that require very targeted input from certain communities or geographies.

##### *Deliverables*

1. *Draft materials for Community Co-creation Round 4, with up to three rounds of edits, 30 days prior to Round 4*
2. *Final materials for Community Co-creation Round 4, 15 days prior to Round 4*
3. *Draft materials for Community Co-creation round 5, with up to three rounds of edits, 30 days prior to Round 5*
4. *Final materials for Community Co-creation Round 5, 15 days prior to Round 5*
5. *Draft Community Co-Creation Report, 30 days after each round, with up to two rounds of edits*
6. *Final Community Co-Creation Report, 45 days after each round*
7. *Up to 12 office hours events (4 per round of community co-creation, includes rounds 3, 4 and 5) for co-creation report back (part of STEIP)*
8. *Up to two rounds of community co-creation workshops*

##### **Task 4.2 CBO and EAC Payment Management**

The Consultant will manage compensation of EAC members, CBOs, and community co-creation workshop participants,

##### *Deliverables*

1. *Report of CBO payments 30 days after each round of co-creation that includes payee name, amount, CBO affiliation, date sent via US Mail or e-mail, and gift card number*
2. *Bi-monthly report of EAC payments 30 days after each meeting that includes payee name, amount, date sent via US Mail or e-mail and gift card number*

### **Task 5 As-Needed Engagement and Outreach Support**

Engagement and outreach deliverables that fall outside of Tasks 1-4. Prior authorization is required to draw upon these hours. If the PMT and Consultant agree that there is a need for additional engagement and outreach support in the areas summarized below, Consultant will prepare a work plan modification request defining the proposed scope, schedule, and budget of the additional services for PMT review and approval. Approval of the work plan modification request is required before the Consultant can undertake any work under this task.

#### **Task 5.1 Program Wide**

The Consultant will provide as-needed support to the PMT on any identified engagement and outreach needs during Phase 1. Prior authorization from the PMT is required to start deliverables under this task. Deliverables will be identified in collaboration between the Consultant and the PMT.

##### *Deliverables*

1. *Deliverables will be identified on an as-needed basis by the PMT*

##### *Assumptions*

1. *The upper limit for this support will be 2,500 hours.*

#### **Task 5.1 Equity**

The Consultant will provide as-needed support to the PMT on any identified equity needs during Phase 1. Prior authorization from the PMT is required to start deliverables under this task. Deliverables will be identified in collaboration between the Consultant and the PMT.

##### *Deliverables*

1. *Deliverables will be identified on an as-needed basis by the PMT*

##### *Assumptions*

1. *The upper limit for this support will be 1,500 hours.*

## **2.0 WORK PLAN ASSUMPTIONS**

The following guidance is provided for informational purposes to assist in the preparation of work plan proposals.

**PMT Review:** the PMT will strive to review all standard deliverables within a 14-day timeline. Complex and highly technical deliverables may take longer to review and involve multiple iterations of submission.

**Business Process Automation:** the PMT continues to look for opportunities to work more efficiently, including business process automation. Consultants will be expected to utilize all forms and process automations in support of Link21 Program delivery.

**Work location:** While the entire team will need to continue to adjust to evolving guidelines, the work plan duration is long enough that in-person work is likely to become more routine. Remaining adaptable to remote support and in-person collaboration will be necessary.

**Ongoing and As-needed Task/Subtasks:** work plans may contain tasks or subtasks titled “Ongoing” or “As-needed” to ensure sufficient funding is available within a work plan for

scope that continues to evolve over the course of the work plan or for scope that cannot be identified at this time or that is dependent on predecessor activities not yet complete or for unanticipated additional support of included scope items. Guidelines for the use of these funds have been developed and require approval prior to use.

### **3.0 SCHEDULE**

The planned duration of this work plan is from March 2022 – October 2023.

### **4.0 POSITION CLASSIFICATIONS NECESSARY TO SUPPORT THIS SCOPE**

Creative Services - Senior  
Creative Services - General Staff  
Digital Engagement - Senior  
Digital Engagement - General Staff  
Equity, Diversity, and Inclusion - Senior  
Equity, Diversity, and Inclusion - General Staff  
Government Affairs - Principal  
Government Affairs - General Staff  
Program Management - Principal  
Program Management - Senior  
Project Controller  
Project Coordinator  
Project Manager - Senior  
Public Outreach - Principal  
Public Outreach - Senior  
Public Outreach - General Staff  
Stakeholder Engagement - Principal  
Stakeholder Engagement - Senior  
Stakeholder Engagement - General Staff

### **5.0 REQUIRED ATTACHMENTS**

1. *Cover Page*
2. *Form 60 (for the prime consultant and each subconsultant) and summary tables (template provided)*
3. *Cost-loaded Schedule*
4. *List of Subconsultants, including scope, estimated value of work, relevant NAICS codes, and Disadvantaged Business Enterprise (DBE)/Small Business Entity (SBE) participation*
5. *Rate Request Letter, if required (for any rates in excess of \$115/hr); resume for each individual requested to be included; must include overhead rate schedule and financial statements or audited overhead report – to be approved at the discretion of the BART agreement manager*
6. *Overhead Rate Letter, if required (for any firm exceeding 150% rate)*
7. *Subconsultant Addition Request (if needed)*
8. *Conflict of Interest (COI) Certifications*

**Prime: HDR Engineering**

<b>Subconsultant</b>	<b>Amount</b>	<b>DBE (Y/N)</b>	<b>SBE (Y/N)</b>
Keams & West	\$1,385,794	N	N
Beverly Scott & Associates	\$304,000	N	N
Civic Edge Consulting	\$673,540	Y	Y
Gray-Bowen-Scott	\$226,443	N	N
IMAGEN	\$254,340	Y	Y
incommon	\$162,700	N	N
Lowe Consulting Group	\$87,667	Y	Y
LTR Advisory Services	\$88,800	N	N
Prosio Communications	\$927,787	Y	Y
Rainwater & Associates	\$209,233	N	Y
Rose Strateegic Communications	\$190,400	N	N
Sagent	\$377,495	Y	Y
Studio Percolate	\$287,550	N	N
Urban Planning Partners	\$319,350	Y	Y
Varner PR	\$181,974	N	N
Winter Consulting Group	\$266,025	Y	Y

**Work Plan Value: \$8,898,951**